JOB DESCRIPTION
INTERN
December 2022

WHO ARE WE?

Full Circle Financial Group, Inc. and Full Circle Insurance Solutions, Inc. are unique in the financial services industry in how we care for each other, our clients, and our community. We are seeking candidates that have a caring spirit as well as embody our Core Values of Trust, Generosity, Compassion, Knowledge, and Patience. Our team members have a heart to serve others and a will to get things done.

We are independent yet affiliated companies that provide Financial and Insurance services to businesses and individuals in a dynamic, fun, and often fast paced environment. We are headquartered in the Hampton Roads area of Virginia and our Advisors and Agents are registered and licensed to provide services to clients in multiple states from California to Florida.

WHAT WILL YOU LEARN?

There are many things to learn as you pursue your degree related to financial services, management information systems, marketing, and/or business. With that said, there are basic skills and knowledge we think are important to learn about the "Business of the Business." Topics include:

- Choosing a mentor and learning environment
- Focusing on your strength as a Technician, Advisor, or Retention Specialist
- The differences between independent, wire house, bank, and insurance firms and companies
- Being able to create a solid business plan
- Being taken seriously as a new Financial Advisor
- Finding a work/life balance
- Forms of compensation

You will also be provided an opportunity to learn more from seasoned advisors and agents about the following:

- Insurance Industry:
    - Employee Benefits (Group & Individual)
    - Life, Health, Disability, and Long-Term Care
    - Medicare Planning
- Investment & Planning Industry:
    - Regulation Best Interest
    - Financial Planning
    - Retirement Income Planning
    - Wealth Management
    - Special Needs Planning
    - Estate Planning Considerations

    - Tax Planning Considerations

- Business Development
    - Prospecting and Networking
    - Cultivating Centers of Influence
    - Planning and Executing Value Added Events
    - Using a Contact Management System
- Community and Public Relations
    - Volunteer Opportunities
    - Social Media Outreach

More importantly, you will learn how all of those areas work together to bring value to those we serve. This experience will help lay a well-rounded and solidly-grounded foundation for your financial services career. You will be working in a collaborative environment with our experienced advisors, as well as outside tax and legal professionals, who will freely share their industry wisdom and expertise. You will also be provided the opportunity to carry that spirit of service and caring into our local community through paid volunteer hours.

WHAT WILL YOU DO?

- Provide direct support to our experienced advisors and client service team
- Spend time working directly with an assigned mentor
- Distribute client newsletter campaigns using our company CRM
- Participate in meetings with advisors and client service team
- Partake in our Lunch and Learn programs
- Input and update data in company Client Relationship Management software
- Assist with coordination of schedules between clients and advisors
- Make outbound client service calls
- Create and update company presentations and reports
- Assist with revisions to standard operating procedures manual

This job operates in a clerical office setting using standard office equipment such as computers, phones, copiers, and filing cabinets. This is largely a sedentary role but would require the ability to lift files, open filing cabinets and bend or stand as necessary. The work schedule is very flexible between the hours of 8:30- 5:00 pm. Monday through Friday. This position does not allow for a remote work schedule.

WHO ARE YOU?

The ideal candidate will possess the following:

- College Student or Recent Graduate

- Organizational leadership experience
- Ambitious spirit to grow professionally
- Strong personal and professional ethics and integrity
- Ability to absorb different kinds of information quickly
- Excellent verbal and written communication skills
- Problem solver with the ability to leave things better than you found them
- Above average familiarity with Microsoft Office suite of applications (Word/Excel/PowerPoint/Outlook)
- Must be able to pass required background check

COMPENSATION & BENEFITS

This part time position has a rate between $15 - $18/Hour depending on experience.

NEXT STEPS

Interested Candidates are asked to provide the following to our Human Resources Director via ContactUs@FullCircleFin.com:

- Resume and Cover Letter
- Two Personal or Professional References